



## Initiation Phase Checklist

---

### Purpose

The Initiation Phase Checklist will assist you in determining which tools and templates support a specific Enterprise Resource Planning (ERP) or Continuous (CBPI) change initiative. The purpose of the tools and templates in AEIOO's Transformation Management Guide is to provide a starting point for Army program managers in planning a transformation management initiative. All tools and templates can be modified to fit a specific ERP or CBPI program's transformation management needs.

### Initiation Phase Checklist

Transformation Management Activity	Tools & Templates	Description
Transformation Management Planning	Transformation Management Strategy	Defines approach to managing change for ERP and CBPI programs for Army Business Mission Area (BMA)
Transformation Management Planning	Transformation Management Work plan	Outlines Transformation Management activities and tasks that support an ERP and CBPI programs
Transformation Management Planning	Initiation Phase Checklist	Identifies tools and templates by program phase that support an ERP or CBPI change initiative
Transformation Management Planning	Enterprise Solutions Performance Measures Reference Model Template	Provides a starting point for developing a program-specific performance reference model
Leadership & Stakeholder Management	Leadership Alignment Guidelines	Aligns leaders, at every level of the organization, to the business objectives of the change initiative. Identifies leadership roles and responsibilities needed throughout an engagement life cycle in order to drive implementation and leverage the change initiative.
Leadership & Stakeholder Management	Leadership Alignment Interview Guide	Establishes if leadership understands organization's future direction and determines how specific organization priorities support the strategy
Leadership & Stakeholder Management	Stakeholder Involvement Planning Guidelines	Assists in identifying an ERP or CBPI program's stakeholders and their issues/needs as well as in determining the involvement necessary for the transformation



Transformation Management Activity	Tools & Templates	Description
		management effort
Leadership & Stakeholder Management	Stakeholder Involvement Commitment Template	Identifies the level of commitment needed from each of the stakeholder(s)/ stakeholder groups to support the Transformation Management initiative
Leadership & Stakeholder Management	Stakeholder Involvement Requirements Template	Identifies each stakeholder(s)/ stakeholder groups role in support an ERP or CBPI program change as well as their impact on the transformation management initiative
Leadership & Stakeholder Management	Stakeholder Involvement Identification Analysis Template	Identifies the key stakeholder(s)/stakeholder groups that the ERP or CBPI program impacts. It also assesses several characteristics for each stakeholder(s)/ stakeholder groups associated with the transformation management initiative
Communications	Communications Planning Guidelines	Develops a change communication strategy and work plan to assist in an ERP or CBPI transformation initiative
Communications	Communications Goal Themes Setting Template	Assists in determine a series of goals for achievement through the implementation of the communication strategy, as well as the key themes for communication
Communications	Communications Leaders Guide	Introduces ERP or CBPI program team members and impacted personnel to program and the decision that were taken to guide organization to deliver its mission, vision and strategy
Organizational Alignment	Responsibility Charting (RACI)	Defines and summarizes roles and responsibilities for given decision activities and task to support an ERP or CBPI program initiative
Organizational Alignment	RACI Template	Sample RACI Template
Organizational Alignment	Team Design & Completeness Guidelines	Assists in finalizing tactical designs and ensuring that all

Transformation Management Activity	Tools & Templates	Description
		design consideration have been finalized as well as identifying the implementation of the ERP or CBPI solution
Organizational Alignment	Team Design & Completeness Template	Team Design & Completeness Template
Organizational Alignment	Roles & Measures Guidelines	Provides a quick way to document the roles, responsibilities, accountabilities and measures necessary for each department, team/work group, and individual within an organization
Organizational Alignment	Roles & Measures Matrix	Sample Roles & Measures Matrix
Learning	Learning Needs Assessment	Identifies the learning needs for an ERP or CBPI program's end-users. The data gathered from the Learning Needs Assessment can be used to determine the learning approach for the personnel impacted by program initiative.
Learning	Learning Needs Strategy	Outlines an overall approach for the learning component of an ERP or CBPI program. In addition, the strategy includes an overview of the primary program learning activities and will serve as a baseline for managing the learning scope.